Subject: Creating an Initial Application	Number: 650-56
Effective Date: March 14, 2017	

PURPOSE:

To provide instructions on how to enter an initial EMT applicant into the Central Registry and document the statewide certification.

REGULATION GUIDANCE:

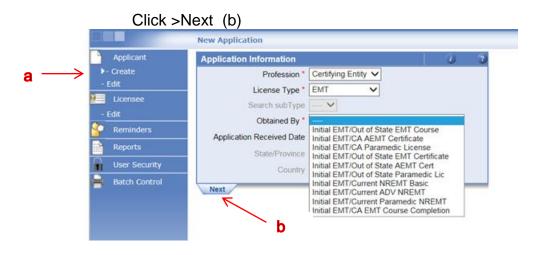
According to Section 100344 of Chapter 10, a certifying entity is required to enter certification into the Registry for each certification applicant no later than 14 calendar days from the date the applicant successfully meets the certification requirements.

REFERENCE:

- Chapter 10: California EMT Central Registry, Section 100344
- Chapter 2: EMT Initial Certification Requirements, Section 100079
- Procedure 650-58 Renewing an EMT Certification
- Procedure 650-68 How to Reinstate an EMT
- Procedure 650-80 Unarchiving an EMT Record
- Procedure 650-82 Creating an Alias

PROCEDURE:

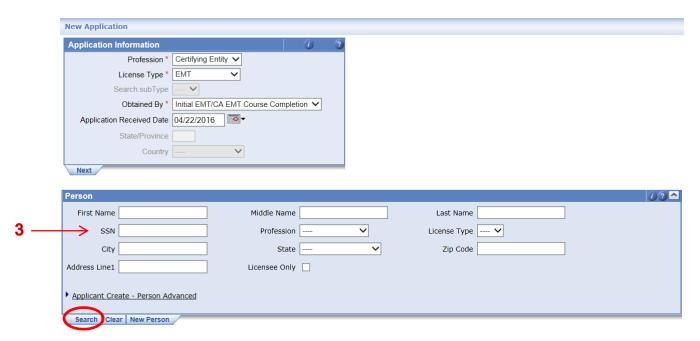
- 1. In the left column of the Central Registry under Applicant, click >Create (a)
- 2. In the Application Information panel, set the fields as follows:
 - For the "Profession" option, select "Certifying Entity" from the drop-down menu.
 - For the "License Type" option, select "EMT" from the drop-down menu.
 - For the "Obtained By" option, select the correct Initial Certification option for this EMT from the drop-down menu.
 - Enter the correct date into the "Application Received Date" you can type in the date or click on the calendar to the right.



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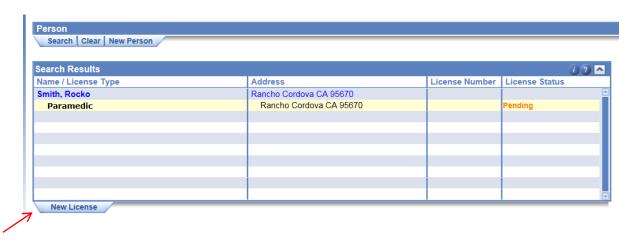
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3. The Person mini panel is now displayed. Before you can enter a new person record, you will need to search to see if the person is currently in the registry. Enter the social security number and click >Search.



Possible Scenarios: Review each section here to identify how to find an existing record. If you do not find the record in these pathways, go to Step #4 to create a new record.

a. A person record may already exist in the registry if they hold a Paramedic license or if their NREMT exam results have been uploaded. Click on the <u>New</u> <u>License</u> tab (a) to connect the Paramedic license and the EMT certification to the same person record.



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OR

b. A person record will be displayed if the person has been certified previously as an EMT; DO NOT CREATE A NEW RECORD. The EMT should be "renewed" or "reinstated" from the **existing** record. You would click on the underlined <u>EMT</u> (b) to pull up the existing EMT record and process a renewal or reinstatement.



OR

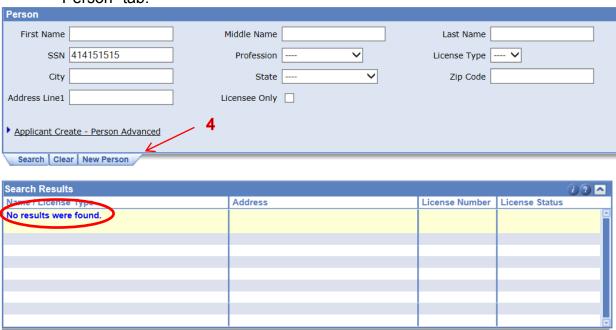
c. A person record might be <u>archived</u>. If you searched Licensee Edit and did not find the person, try searching for the EMT record through Licensee Edit, Licensee – Person Advanced (1) and check the "Archive Only" box (2). If archived, it will need to be "unarchived" in order to process the re-certification. Follow the procedure for "Unarchiving an EMT Record" #650-80.



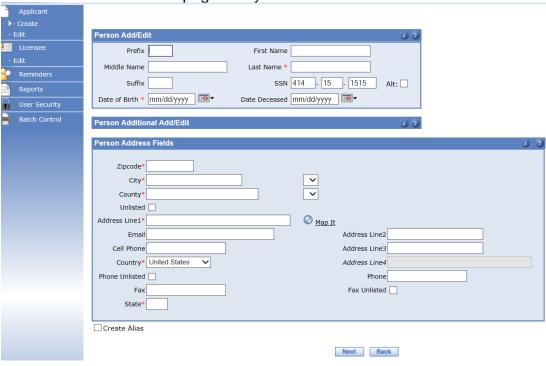
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4. If the person is not showing up as being in the database, click the "New Person" tab.



5. This is the new page that you will see:

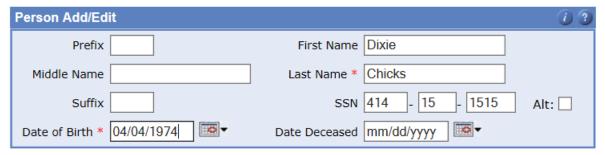


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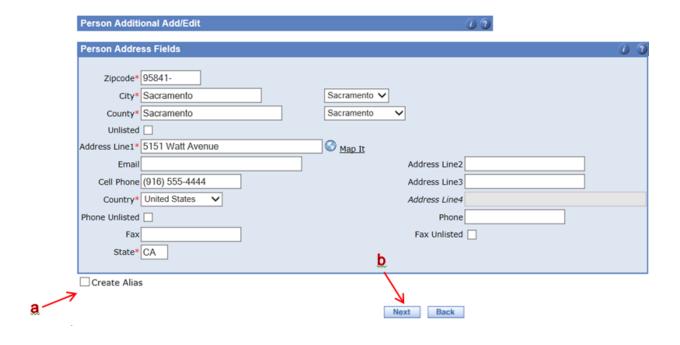
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- 6. Fill in the following:
- · First Name, Last Name, SSN, DOB



- Zip Code (once you input the Zip Code, the City, County and State will autopopulate), Address and Phone Number.
- Note: the Create Alias box in the lower left corner (a) is used to update the Person record later as needed for legal name changes and these will show up in the Alias panel. For future reference: Follow the procedure for "Creating an Alias" #650-82.
- Click > Next (b) to proceed with the Initial application

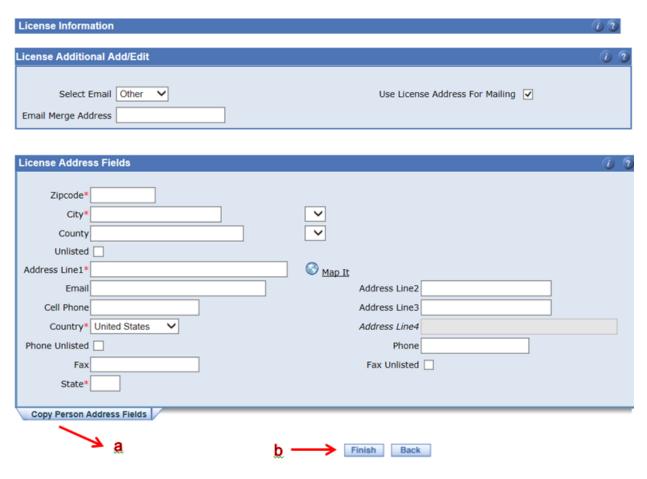


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7. If the mailing address is the same as the address you typed in on the prior screen, then you can click on Copy Person Address Fields (a) or you may fill in the mailing address.

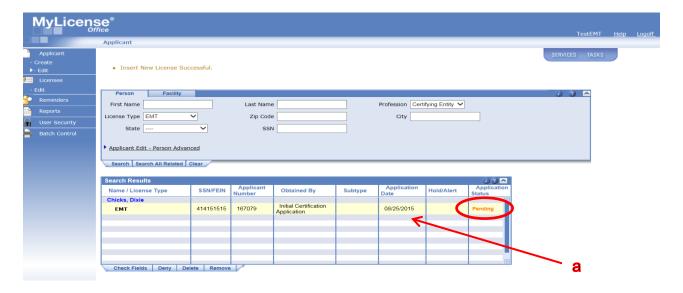
Click >Finish (b) at the bottom of the page.



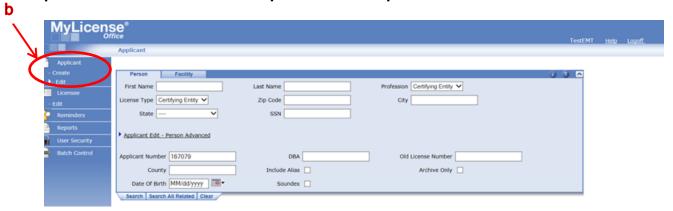
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8. Below is the top half of the new page you will see. Under Search Results, you will see a "pending" status on the record (circled). This status will remain until you have completed the certification process on the EMT. The application date shown in this panel (a) is not the same as the date you entered for receipt of the EMT application in Step 1. This is a system date showing when the application was entered to the Central Registry.



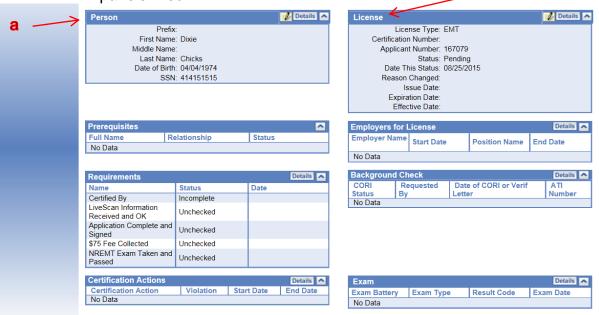
IMPORTANT NOTE: if you time out of MLO or leave this application and return later, you will need to open the pending application through <u>Applicant Edit (b)</u>, not Licensee Edit, to <u>continue the process</u>. Search in Applicant Edit with the SSN or Applicant # to pull up the pending record. There you will be able to access "DETAILS" in all of the minipanels and continue until the process is complete.



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9. The lower half of the page will show the Person (a) AND part of the License (b) mini-panels filled in.



10. Next go into the Background Check mini-panel and click on the "details" button in the top right-hand corner (a).



Below is the screen that will open. Click on the "Add" tab (b).



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- The Background Check mini panel will open this is where certifying entities can log receipt of CORIs as required by regulation.
 - There are two options in the drop down menu for CORI status (a):
 - Background check prior to July 1, 2010 is used only for EMTs that were grandfathered into the Central Registry and the certifying entity submitted a Letter of Verification to EMSA at that time. Do not use this option unless it was left blank originally and now needs to be filled in. You must verify that this process was done.
 - EMSA Receiving CORI Report is the option to choose for all new EMTs, EMTs changing certifying entities or EMTs that are reinstating and have lapsed over one year.
 - Requested By: this would be your agency
 - Date of CORI: the date both FBI and DOJ reports have been received from the Department of Justice (DOJ) by your agency.
 - ATI Number: This will be on the report you receive from DOJ and is on the live scan application.
 - DO NOT FILL IN "NLI." This means No Longer Interested and you do not fill that in until the EMT has not recertified with your agency within 12 months of expiration.

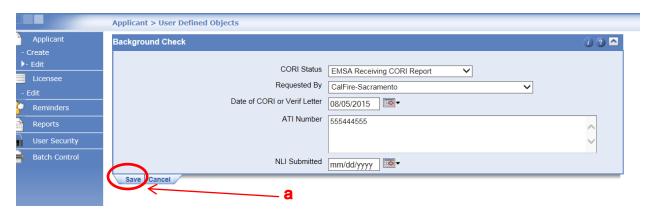


a

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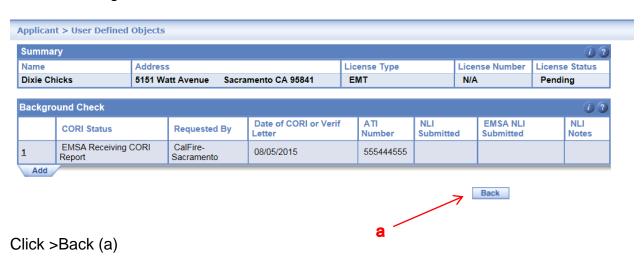
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12. Below is an example of what should be filled in on the background check mini panel for an initial EMT applicant:



Click >Save (a)

13. This is the screen you will see once you have entered all necessary background check information:



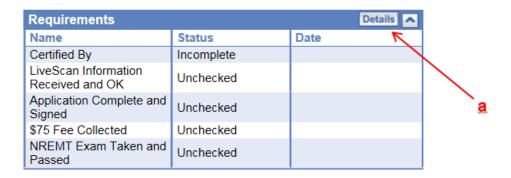
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14. The Employers for License mini panel (a) is not necessary for processing EMT certification. It is used in paramedic licensure. If you can find the employer in the drop down, then you can add it if you like.



15. The next step is to complete the Requirements mini panel. Click on the "details" button in the top right-hand corner (a).

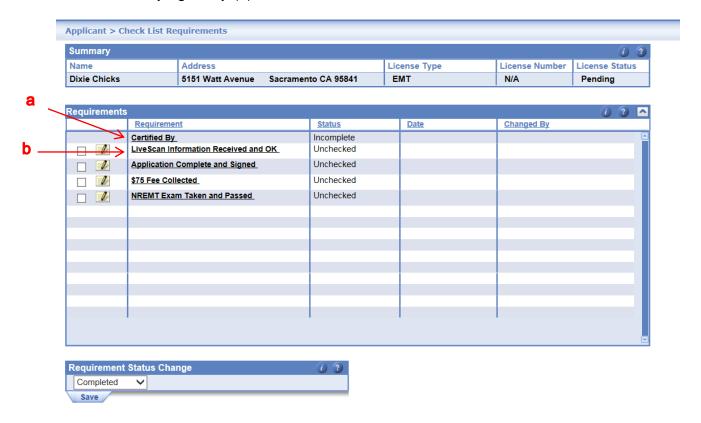


IMPORTANT NOTE: If you chose the wrong Obtained By and discover this mid-process, you may send a helpdesk ticket for assistance. This can be changed while still in pending, by the BLS Coordinator. Once the certification is approved, it cannot be changed, but you can document notes in the License panel clarifying.

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16. The first item on the checklist, (a) "Certified By," should already show a status of complete, because that is tied to the pre-requisite mini panel. If it shows "incomplete," you may need to contact the BLS Coordinator to review and correct the status. The LiveScan Information Received and OK means that the FBI and DOJ reports have been received, reviewed and cleared by your certifying entity (b).

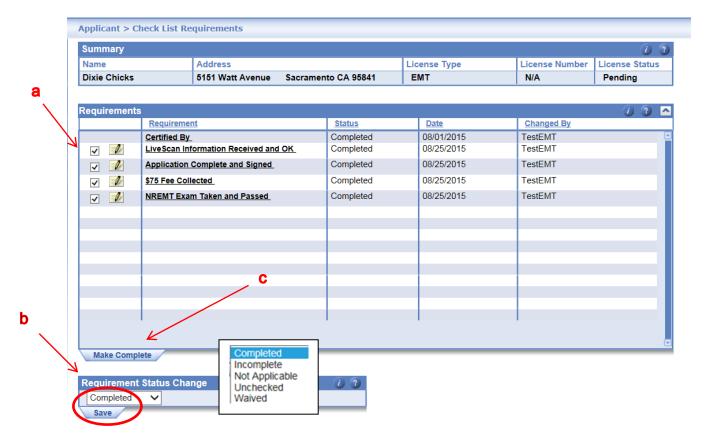


- The checklist requirements match the Obtained By option you chose. Each item on the checklist is required. If one item is not complete, then the certification should be left in pending temporarily until all requirements are met.
- If the application is withdrawn or incomplete for a long period of time, it can be deleted or removed. If an application was created in error, it can be deleted and archived. See Procedure #650-66 Removing a Pending Application.

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17. Check off each item in the checklist (a), then go to the Requirement Status Change panel at the bottom of the checklist and choose "completed" (b) from the drop-down box and SAVE. Each checklist matches the requirements for the chosen "Obtained By" so you would not use the other options.



- 18. Now click on the **MAKE COMPLETE** tab (c) which is right above the Requirement Status Change. This is commonly forgotten, so take heed! You will not receive an APPROVE TAB until you <u>Make Complete</u> all Requirements.
- 19. After you choose MAKE COMPLETE, click >BACK (d) as shown below.



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Important Note: If you clicked Make Complete and Back, then received an error code saying that the background check is incomplete (as shown below), then you will need to fill in the missing information (or send a helpdesk request) and then come back to the Requirements mini-panel shown in Step #17 to click the Make Complete tab again.

Following error(s) have occurred:

Applicant

- · "Background Check" CORI Status data missing.
- "Background Check" Date of CORI missing.
- "Background Check" Requested By is missing.
 - 20. The Search Results screen in Applicant Edit will now appear, as shown below. You will see the APPROVE tab (a). If the Approve tab does not appear, then something is missing in the record. Check Fields, all requirements (including Make Complete tab), background check, and verify that the pre-requisite relationship is established correctly (with your agency listed). If the Approve tab still does not appear, send a helpdesk request to mlohelpdesk@emsa.ca.gov for further assistance.

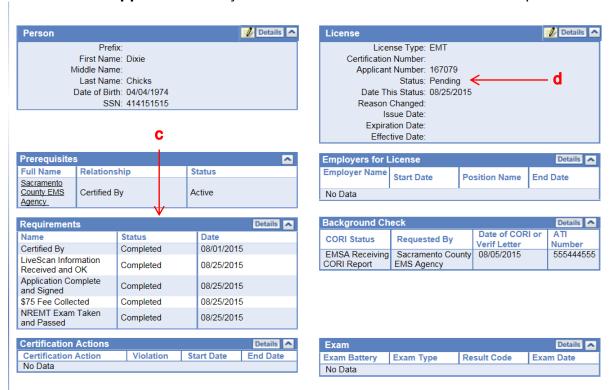
Person **Facility** Search | Search All Related | Clear Search Results Applicant Application Application Name / License Type SSN/FEIN **Obtained By** Subtype Hold/Alert Chicks, Dixie Initial Certification FMT 167079 08/25/2015 Complete Application a Approve Check Fields Deny Delete Remove

21. Click >Approve (a). The process is not complete until you approve and enter the expiration date. Note: the application status above (b) means that the requirements are complete, not the certification process.

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As shown in the screenshot below, the requirements are complete (c), but the status in the License minipanel is still "pending" (d). In order to finish the certification process, **make sure to approve** so that you can enter dates and send the card to print.



22. After you click the Approve tab, you will see Summary and License Activation panels. Enter the Issue Date (a), which represents the effective date for the certification, or use the drop down. The issue date for an initial application is the day certificate (EMT card) is issued.



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- 23. Next, enter the expiration date (a) based upon the Obtained By used. The expiration date will be either:
 - The last day of the month, two years from the effective date of the initial certification

OR

 The expiration date of the certificate or license used to establish eligibility (such as a Paramedic license or NREMT expiration), if less than two years and was used to establish eligibility for certification vs EMT coursework completed within the last two years.



REMINDER: Regulations require certifying entities to enter certification information into the Registry for each certification applicant no later than 14 days from the date the applicant successfully meets the certification requirements. Backdating an issue date beyond the 14 days may be a violation of Title 22, Division 9, Chapter 10, Section 100344.

24. Finally, click **OK** (a), and the record will be saved to the Licensee area of the database and sent to your "Batch Control/Current" area (on the left hand side of the page). The card is ready to print. Make sure you choose the option "EMT Initial Card" to find the name of the EMT whose card you wish to print. If EMSA prints your EMT cards, those will be sent to the address you entered in Step 7.



The certification has been completely processed and approved.